

COE Exceptional Entertainment Requests

Approval Guidelines

Occasionally, exceptional circumstances are unavoidable and necessary to achieve a valid UC Berkeley business need (e.g., meal expenses exceed the maximum rate per-person, the event includes employee morale-building activities or the purchase of flowers; or entertainment of the spouse or equivalent of a guest or the official host). In these cases, an exceptional entertainment approval should be obtained from the appropriate university official with delegated authority.

Effective January 19, 2009 prior approval from CoE Dean and/or EVCP is no longer required.

To minimize the risk associated with after-the-fact exceptional approvals, all exceptional entertainment requests should continue to be routed to the Assistant Dean's office for review prior to the event. If the final dollar amount is greater than the original amount submitted you will need to route again to obtain a new approval.

Approving authority

- CoE Dean has the authority to approve exceptional entertainment requests if the per-person cost does not exceed 50% above the standard limits set by University Policy.
- If the per-person rate is more than 50% over the maximum meal rate, written prior approval must be obtained from the EVCP. When the proposed rate is over 200% of the maximum rate, prior approval is required from the Chancellor's office.

Entertainment limits/Procedures: when you are the Planner or Host

- Exceptional entertainment requests should be reviewed by ERSO Reimbursement Services manager before submitting to COE Dean. ERSO will route requests to Dean's Office for approval.
- Per-person allowable limits:
Breakfast @ \$27, Lunch @ \$47, Dinner @ \$81, Light Refreshment @ \$19
- The per-person meal cost calculation includes food/beverage/labor/services/taxes and gratuity, but excludes cost of table decorations, chairs, linens, plates, glasses, room, and equipment rentals.

The following documents are recommended for a typical exceptional approval request package:

- A signed memo with business justification from the sponsoring faculty or Center Director/Manager to COE Dean (or EVCP if the circumstances warrant) to articulate the necessity and the business benefits to UCB for incurring such expenditures.
- Invoice and completed [Entertainment Form](#)

Note: Only Supply Chain Management (SCM) Campus Buyers can sign off hotel or catering contracts or agreements on behalf of UC Berkeley. Please refer to [ERSO Contract Review Guidelines](#) for the process or contact ersotravelhelp@erso.berkeley.edu for assistance.